European Opportunities in Client/Server Information Services

Peter Lines
Managing Director
INPUT—Europe

European Client/Server Markets

- Economic/political environment
- User community impacts
- Five-year market forecasts
- Services industry—year 2000
- Strategies for success

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European Community 1993

- Shattered vision and economic difficulties create new environment for IT decisions

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European IT Users

- Demand client/server applications
- Require support and services
- Drive IT expenditure externally

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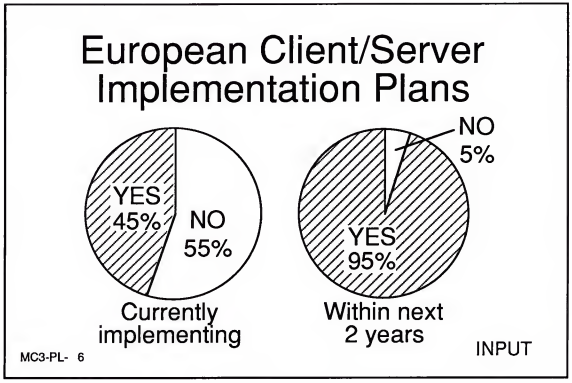

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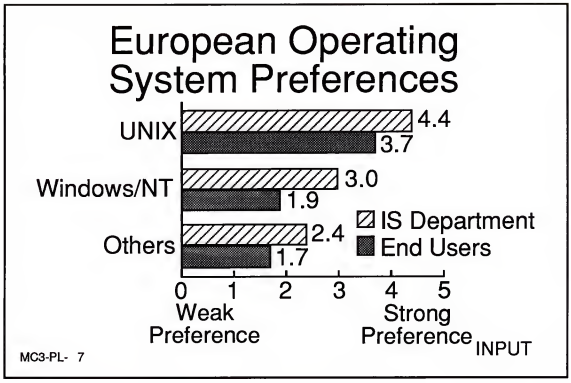

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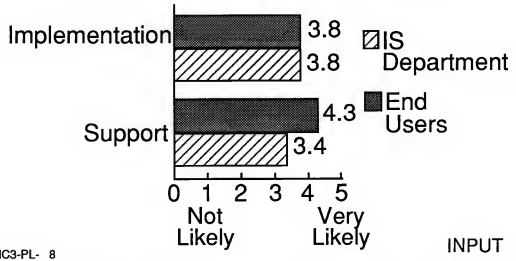
European User Need for Client/Server Services



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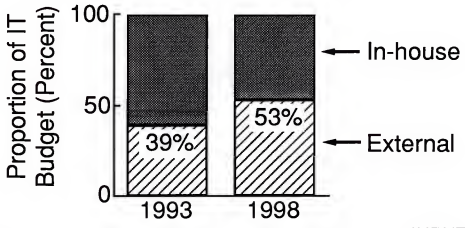
European IT Spending Changes



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European Client/Server Markets

- Sortware product brand leaders scale up
- Open competition for client/server projects
- Transition costs fuel outsourcing

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European Software and Services Market C/S Impact

Sector	1993-1998 CAGR (%)	1998 Market Proportion (%)
C/S	+43	65
Non C/S	-9	15

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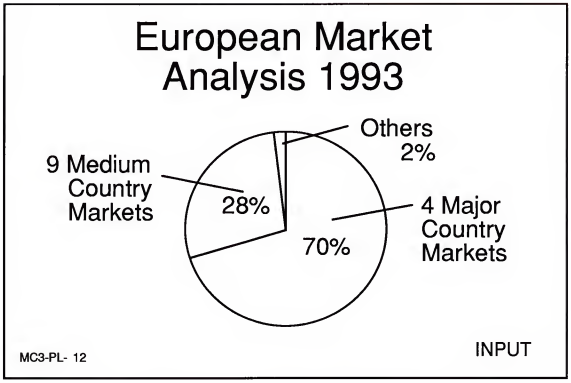

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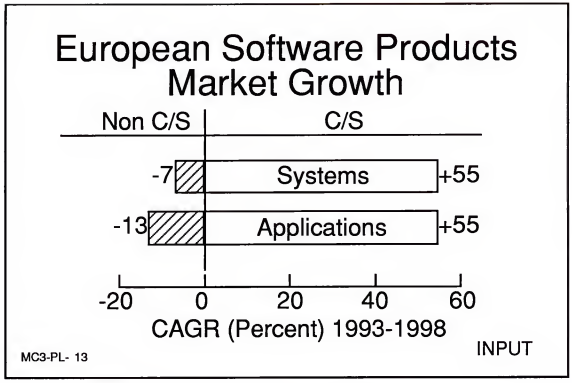

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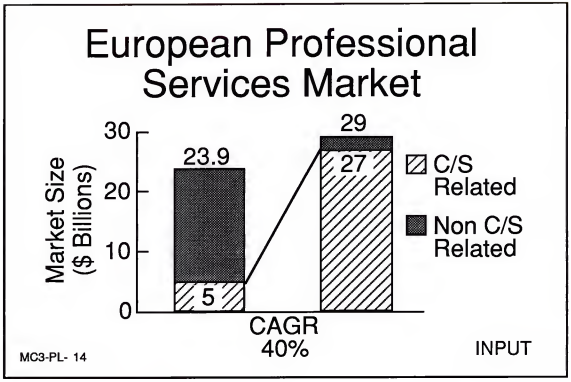

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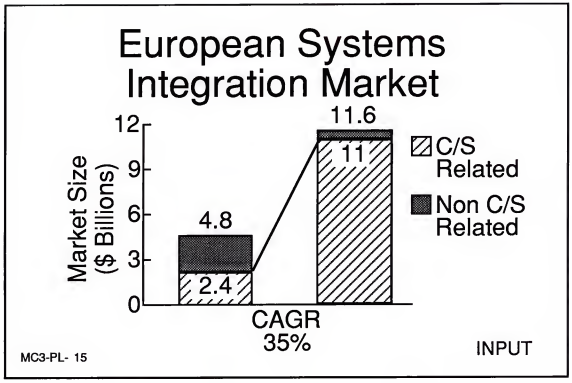

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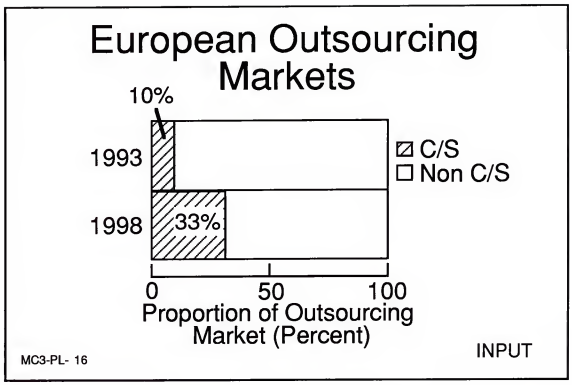

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The European Information Services Industry—2000

- U.S. vendors strengthening market position
- Mid-sized firms challenged

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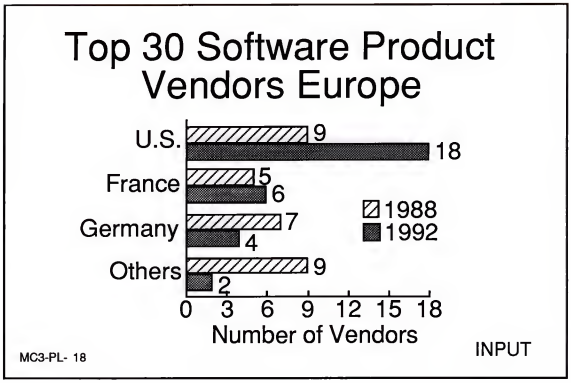

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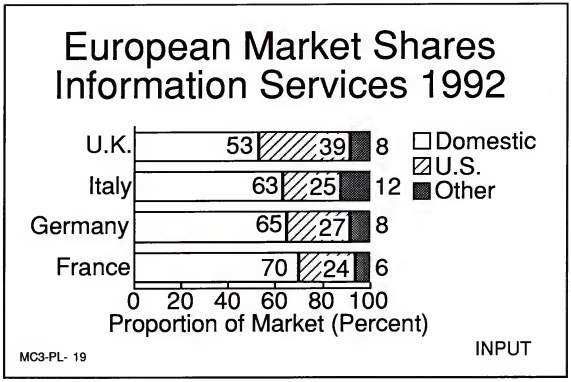

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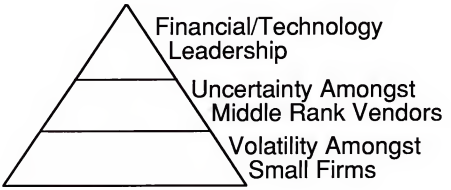
European Info. Services Industry Structure



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European Success Strategies Built on:

- U.S. products
- U.S. experience
- European resources

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PETER LINES
VICE PRESIDENT
MANAGING DIRECTOR

PROFILE

CAPABILITIES

- Peter Lines has twenty-five years of experience in the computer industry. He currently has responsibility for all of INPUT's European Programme research and custom consulting. He specializes in analysis and forecasting of major trends in the computer software and services business in Western Europe.

BACKGROUND

- With INPUT since 1983, Mr. Lines originally set up the Western European Market Analysis Programme for the computer software and services business. Subsequently he took management responsibility for all research in Europe, including INPUT's Customer Services Programme and custom consulting assignments. Mr. Lines became a Director of INPUT, Ltd. on the 1st January 1988.

- Prior to INPUT, he was with Sperry Computer Systems' U.K. subsidiary where he held a variety of posts, including those of Regional Software Support Manager, Regional Marketing Support Manager and Marketing Planning Manager.

- Mr. Lines commenced his career in the computer industry in 1966 with English Electric Computers (subsequently ICL), as a systems analyst.

EDUCATION

- B.Sc. (Economics), London School of Economics